L. C. 1988-316

A · GUIDE · FOR
EFFECTIVE TRAINING

SOLUTIONS
AT WORK

Alberta
CAREER DEVELOPMENT
AND EMPLOYMENT

DDN 7997036

A · GUIDE · FOR
EFFECTIVE TRAINING

CANADIANA
MAY - 2 1988

ISBN-1-55006-097-X 88-03-30M

EMPLOYERS:

Employee training requires careful planning. This guide is designed to provide practical information to help you train more efficiently. Use this workbook to take you through the training process.

For further information or help, contact your nearest Career Development Centre or the Career Information Hotline:

BONNYVILLE

Room 209
Provincial Building
Box 3219
Bonnyville, Alberta
T0A 0L0
Telephone: 826-6142

CALGARY

Room 306
1015 Centre Street, N
Calgary, Alberta
T2E 2P8
Telephone: 297-6247

EDMONTON

4th Floor, One Twelve Professional Centre
10050 - 112 Street
Edmonton, Alberta
T5K 2R4
Telephone: 427-8517

FORT MCMURRAY

7th Floor, West Tower
Jubilee Centre
9915 Franklin Avenue
Fort McMurray, Alberta
T9H 2K4
Telephone: 743-7192

GRANDE PRAIRIE

Provincial Building
Rm. 1201, 10320 - 99 Street
Grande Prairie, Alberta
T8V 6J4
Telephone: 538-5430

HINTON

Yellowhead Building
P.O. Box 1850
Hinton, Alberta
T0E 1B0
Telephone: 865-8293

LETHBRIDGE

402 Professional Building
740 - 4th Avenue S.
Lethbridge, Alberta
T1J 0N9
Telephone: 381-5419

RED DEER

Provincial Building
4920 - 51 Street
Red Deer, Alberta
T4N 6K8
Telephone: 340-5366

VERMILION

Room 2001
Provincial Building
Box 268
Vermilion, Alberta
T0B 4M0
Telephone: 853-8150

CAREER INFORMATION HOTLINE

Dial "0" and ask for Zenith 22140 or, in Edmonton, dial 422-4266.

TRAINING CAN SAVE YOU MONEY

Good training increases the productivity and efficiency of your employees. The following benefits all stem from effective training and result in increased profits for your business:

1. Increased production
2. Fewer errors
3. Reduced spoilage
4. Improved customer relations
5. Lower staff turnover (reduced labour costs)
6. Better customer service
7. Less time spent in direct supervision
8. Higher morale (reduced absenteeism)

CALCULATE YOUR SAVINGS - TRAINING REDUCES TURNOVER

Let's look at just one example of the benefits of reduced turnover. The following costs can easily occur anytime replacement staff has to be hired and trained:

hiring costs:	
paper work, orientation	$ 500.00
training costs:	
one trainee ($1,000 per month, direct training costs, decreased production)	$1,000.00
one trainer ($500 per month, instructor's fees or loss of production time of staff trainer)	$ 500.00
	$2,000.00

Avoiding this situation through effective training saves this cost.

Not only does training save you money, it also improves employees' attitudes and motivation. If employees enjoy their jobs and are happy to come to work, they work harder and are more conscientious. Their satisfaction shows in their performance.

WHAT IS TRAINING?

TRAINING IS:

1. *NEW SKILL TRAINING*

   Training for new employees which will provide them with most of the basic skills required to perform adequately in their job.

2. *RETRAINING*

   Training for existing employees which prepares them for a new position or responsibilities (e.g. transfer, promotion) within the firm and covers the basic skills required to perform adequately in the new position.

3. *UPGRADING*

   Training for an existing employee in the same occupation with similar or expanding job duties. Further specialization or new techniques relating to technological changes or new equipment in the work site is needed to adequately function in the job.

4. *CROSS TRAINING*

   Enhancing additional skills, knowledge and attitudes in other areas while performing and retaining existing job tasks as the major activity.

TRAINING IS A PROCESS

There are several questions and related steps which you should consider as the training activities are planned, implemented and evaluated:

1. **DO I NEED TO TRAIN?**
2. **HOW DO I PLAN THE TRAINING?**
3. **HOW DO I PREPARE THE TRAINEES?**
4. **HOW DO I CONDUCT THE TRAINING?**
5. **HOW DO I EVALUATE THE TRAINING?**
6. **HOW DO I FOLLOW THROUGH WITH ONGOING COACHING?**

1. DO I NEED TO TRAIN?

Training plays an important role in achieving your company goals and objectives. If you plan to expand and open another branch, these branch employees may require training. If you want to produce new products, new employees may need to be hired or existing employees may need training on new equipment.

Take a minute to write down your company goals for the next few years, e.g. sales, product lines, markets, production levels, changes in the industry, in relation to your total potential human resources.

PRIORITY	GOALS
E.g.1.	To increase sales of Product X by 10% per year for the next three years. (Require one extra person for production.)

With the objectives as your guide, use the following checklist to determine if you need to train:

	YES	NO
1. Do I need to hire new employees because of expansion?	☐	☐
2. Will I be promoting an employee to a job that requires the development of new skills?	☐	☐
3. Does management spend a significant portion of its time correcting employee errors?	☐	☐
4. Are there a number of employees who are not performing to their maximum?	☐	☐
5. Do employee vacations and sickness cause serious problems for company operation because trained staff are not available to replace them?	☐	☐
6. Has the company experienced unusual staff turnover?	☐	☐
7. Does the company provide orientation about company policies and procedures for new employees?	☐	☐
8. Does the company provide employees with job descriptions outlining their responsibilities and activities?	☐	☐
9. Does the company formally evaluate employees' performance on a regular basis?	☐	☐
10. Is training of employees viewed as a continuous process by your company?	☐	☐

If you answered "yes" to any of the questions 1 to 6 or "no" to any of questions 7 to 10, there is a good chance that your company may require staff training.

WHO SHOULD BE TRAINED?

When deciding who should be trained, carefully examine all potential candidates. Be sure to look at everyone within your company. Can someone from the office be trained for a job in the shop or plant?

Carefully examine any candidate to determine their "fit" in your company and in the particular position. Do not base your decision on the individual's personality or other personal factors; instead, base your decision on the abilities and potential of the individual. Compare their existing skills to those required for the job. This will help you determine the training required.

2. HOW DO I PLAN THE TRAINING?

The first step in planning for training is to determine the expected outcome of the training. The objective of any job-related training effort should be to help employees better perform their jobs.

To clearly define the objectives of the training and to properly train an employee, it is necessary to develop a job task outline.

WHAT IS A JOB TASK OUTLINE?

A job task outline is a detailed, step by step breakdown of each task or skill required to perform a job. The skills should be outlined in a logical order (e.g. from simple to complex, in order of occurrence).

A job task outline differs from a job description in that a job description only provides a summary of what the job is; a job task outline **actually specifies how** to perform the job at a satisfactory level.

DEVELOPING A JOB TASK OUTLINE

Keep in mind the following points as you develop your outlines:

1. The person with the most experience in a particular job should develop the job task outline.
2. Performance standards should state what is expected of the trainee as the job is performed. These standards must be objective and measurable so that accurate and fair appraisals of employee standards can be made. These standards provide a target of a minimum quality level.
3. The time required to learn each job task should be realistically determined. The training time should include practice time and allow for the trainee's learning abilities.
4. The existing skills of the trainee should not be included in the outline.

SAMPLE TRAINING PLAN
WORK DIVISION AND JOB TASK OUTLINE

Trainee: Pat Brown **Position:** Bookkeeper **Required Training Time:** ____________

WORK DIVISION AND JOB TASK OUTLINE	PERFORMANCE STANDARDS
A. BASIC ACCOUNTING 1. Learn what the overall accounting cycle is and why it is set up as it is. 2. Learn what debits/credits are. 3. Learn how debits/credits function in the posting of the following types of accounts:…	Trainee should understand basic accounting principles and be familiar with how the accounting cycle operates. Trainee should be able to review computer prepared financial statements for reasonableness and accuracy. Trainee should be able to perform tasks with minimal supervision according to company policies. REQUIRED TRAINING TIME: ___ Days
B. COMPUTER HARDWARE 1. Determine the computer components, i.e.: - keyboard - diskette - video screen - …	Trainee should be able to identify and explain fully the computer components. Trainee should be able to operate computer terminal and printer under limited supervision. Trainee should be able to set up computer hardware. REQUIRED TRAINING TIME: ___ Days
C. ACCOUNTS PAYABLE PREPARATORY WORK 1. Sort incoming accounts payable data, such as: - suppliers' statements - suppliers' invoices complete with purchase orders - company purchase orders indicating that a liability has been entered into 2. Distribute information, such as: - supplier's statements - purchase orders - suppliers' invoices complete with purchase orders 3. Reconcile vendor statements to vendor invoices by confirming the individual invoices to those on the statement. 4. …	Trainee should be able to prepare accounts payable records accurately and in accordance with company policy and procedures. Trainee should be able to perform all tasks with minimal supervision and assistance. REQUIRED TRAINING TIME: ___ Days

THE DIFFERENCE BETWEEN GOOD AND BAD JOB TASK OUTLINES

1. Do not write a brief job task outline; write a job breakdown for each job task.

   For example:
   Occupation: Auto Body Mechanic
   - Year One

WRONG (Brief)	RIGHT (Breakdown)
1.Sandblast vehicles	1. Identify the material in a body, such as: - aluminum - stainless steel - fiberglass 2. Prepare vehicle for sandblasting 3. Determine if the sandblasting unit is operating properly. 4. ...

2. Do not state performance standards in subjective, hard to measure ways; state them in an objective, measurable manner.

   For example:
   Occupation: Boring Machine Operator

WRONG (Subjective)	RIGHT (Objective)
Trainee should be able to properly set up and adjust boring machines.	Trainee should be able to set up and make adjustments to the boring machines according to the manufacturer's specifications and company policy. Trainee should be able to demonstrate the ability to make the required adjustments with a minimum of assistance.

3. HOW DO I PREPARE THE TRAINEES?

It is important for the trainees to understand what the training will be and why it is being given.

- The trainees should be told what is going to be taught and what results are expected so they can strive to meet the performance standards.
- Preparation attaches an importance to the training and to the trainees. This boosts the confidence and morale of the trainees, and should result in better performance.
- The more involved the trainees are, the more successful the training is likely to be. The trainees have more commitment to the training.

The following points should be discussed with trainees before training begins.

1. Company information including overall goals and objectives
2. The job and how it fits into the overall company operations
3. The job task outline
4. The performance standards

5. Details of the training, including:
   - objectives of the training
   - method of training
   - instructor
   - time and dates
   - location

Encourage trainees to become involved in the preparation and organization of the training and to ask questions whenever they do not understand.

4. HOW DO I CONDUCT THE TRAINING?

Training may be conducted using either individual or group training methods. The benefits of the two types of training are listed below:

INDIVIDUAL TRAINING

- learning pace is individualized
- wide range of learning resources can be used
- a variety of learning styles can be accommodated
- learning can be personalized

GROUP TRAINING

- reduces training time and training costs when several employees are to be trained to do the same task.
- information is quickly spread (e.g. company policy changes)
- employees learn from the trainer and also from each other

METHODS OF TRAINING

1. ON-THE-JOB TRAINING

- instruction and actual hands-on, supervised practice at the actual work site with equipment related to the job
- Advantages
  - inexpensive
  - formal training skills may not be necessary
  - trainees are actively involved receive immediate feedback and can immediately practice what they have been taught
- Disadvantage
  - ties up a trainer for a large amount of time with one employee or a very small group

2. CLASSROOM TRAINING

- instruction off-the-job in a formal classroom style setting
- Advantage
  - provides a training atmosphere that is free from interruptions and distractions
- Disadvantage
  - may not allow trainees enough active participation, depending on the style of classroom training

3. COMBINATION TRAINING

- a mixture of on-the-job training and classroom training that combines the advantages of both methods of training

The number of trainees and the type of job will help you determine the method of training to use.

WHO WILL DO THE TRAINING?

Your next decision is selecting a trainer. You will have to determine if the resources exist within your own business or if you will have to use outside expertise. The following checklist will help you make the decision.

TRAINER REQUIREMENTS	IN-HOUSE CANDIDATES (FILL IN NAMES)					
	YES	NO	YES	NO	YES	NO
1. Has knowledge and skill to perform the work being taught.	☐	☐	☐	☐	☐	☐
2. Has the time to provide the training.	☐	☐	☐	☐	☐	☐
3. Gets along well with all types of people.	☐	☐	☐	☐	☐	☐
4. Can explain skills simply and clearly.	☐	☐	☐	☐	☐	☐
5. Can demonstrate skills simply and clearly.	☐	☐	☐	☐	☐	☐
6. Will take the time to prepare before the training occurs (i.e. lesson plan, lecture notes, materials).	☐	☐	☐	☐	☐	☐
7. Can prepare the job task outline and set the training objectives.	☐	☐	☐	☐	☐	☐
8. Can explain the benefits of training to the trainee.	☐	☐	☐	☐	☐	☐
9. Determines what the trainee already knows about the job before training begins.	☐	☐	☐	☐	☐	☐
10. Understands that some trainees will learn much faster than others.	☐	☐	☐	☐	☐	☐
11. Will praise trainees frequently.	☐	☐	☐	☐	☐	☐
12. Will acknowledge trainee's correct performance before pointing out areas that need improvement.	☐	☐	☐	☐	☐	☐

An effective trainer must have all these requirements. If you have someone within your organization who has some, but not all, of these requirements, you may need to train your trainer, or look for outside sources of expertise. These sources include consultants, public institutions and government agencies.

OTHER TRAINING PREPARATIONS

The next step is to finalize training details, by answering the following:

1. Where will the training take place?
    - prepare the area in advance so effective training can take place
    - the area should be orderly, comfortable, properly lighted, and adequately ventilated
    - for classroom training, there should be enough tables and chairs

    ____

    ____

    ____

2. When will the training take place?
    - set exact dates and times

    ____

    ____

    ____

3. What materials will be used?
    - be sure materials are prepared far enough in advance and audiovisual equipment is ordered with enough time for pre-screening. You do not want any last minute surprises.
    - machinery used for demonstrations and supervised practice should be checked in advance to ensure sound working order.

NOTES

☐ Handout materials (exercises, instructions, etc.) ______________________________

☐ Manuals (company policies, brochures, etc.) ______________________________

☐ Reference books ______________________________

☐ Audiovisual equipment ______________________________

☐ Demonstration materials/ equipment ______________________________

☐ Supplies (paper, pencils, notebooks, etc.) ______________________________

☐ Simulator/computer time ______________________________

☐ Other ______________________________

EFFECTIVE WAYS TO DELIVER THE TRAINING

1. BE PREPARED

Know ahead of time what topics will be discussed, and prepare a detailed outline of these topics to use as a guide. Rehearse the contents of presentations and demonstrations.

2. USE REPETITION

Opportunities to repeat procedures several times under practical conditions will result in good work habits.

3. SPEAK CLEARLY AND WITH EMPHASIS

It is important that trainees understand and can follow what you are saying.

4. LOOK AT THE TRAINEES

Speak **to** the trainees and watch for signs of interest, confusion, or boredom.

5. DEVELOP A RAPPORT WITH THE TRAINEES

If the trainees feel comfortable and enjoy the training, they will be more likely to learn.

6. USE TRAINING AIDS

Training aids create interest and may often help trainees retain information. You may wish to include such training aids as flip charts, overhead transparencies, guest speakers and films.

7. USE HUMOR CAREFULLY

Do not let humor take you off topic or detract from the importance of the training. Only use humor if you can deliver it effectively.

8. ASK QUESTIONS EFFECTIVELY

a) State the questions clearly
b) Ask questions of the group as a whole
c) Encourage individual answers
d) Encourage all trainees to be involved and answer questions
e) Encourage complete and clear answers
f) Use "yes" or "no" questions sparingly
g) Follow through on employee questions and probe for understanding
h) Ask only one question at a time

9. EXPLAIN YOUR ACTIONS

If trainees know **why** something is done, as well as how it is done, it will make more sense and be easier for the trainees to retain.

10. DEMONSTRATE

An explanation of how to do something is rarely as clear as **showing** trainees how to do something. Keep these points in mind when demonstrating:

a) Explain what you are going to do before you do it
b) Demonstrate slowly
c) Be sure trainees can see clearly

11. PROVIDE SUPERVISED PRACTICE

Have the trainee practice the new skill or technique in a controlled setting under supervision to allow learning through doing.

a) Allow the trainee to start the process or procedure
b) Reinforce or correct as necessary
c) Allow the trainee to practice the skill until comfortable with it

12.BE SUPPORTIVE

Support helps trainees to build confidence, and encourages them to try harder.

13.GIVE FEEDBACK

Help trainees with anything that is giving them trouble. Also, give praise when something has been done well.

5. HOW DO I EVALUATE THE TRAINING?

Evaluation of the training provides the following benefits:

- better training programs
- an objective working climate
- a basis for feedback
- improved employee relations
- improved management

Remember that **you**, the employer, are responsible for your own training. These evaluations will help you develop better, more effective training.

It is important not only to evaluate the performance of the trainees, but also to evaluate the trainer and the training program in relation to the training objectives.

Trainees should be evaluated at 3 stages of the training process:

1. before the training takes place
2. during the training
3. after the training has been completed

Methods of evaluating trainees include the following:

1. short quizzes or tests
2. informal questions
3. review of work performed
4. performance reviews

NOTES ON PERFORMANCE REVIEWS:

- Include a measure of the trainee's performance to the performance standards.
- Be objective, using very specific measures. Instead of a rating of very good, good, etc., the definition of the rating should be used (i.e. very good, able to type 45 words a minute with no errors; good, able to type 45 words a minute with 2 errors per page; etc.).
- Write it down. A copy of the appraisal should be given to the trainee.
- Conduct the review in private, as this type of meeting will help you to determine the causes of any problems and also to stress the importance of the appraisal.
- Cover all the important skills, attitudes and knowledge required to perform the job. Be sure you cover each point. Do not spend too much time on any one point; deal with each point objectively, then move on to the next.

EVALUATING THE TRAINER AND THE TRAINING PROGRAM

Encourage and support realistic and constructive feedback.

Trainers should be evaluated by the trainees upon completion of the training. The trainees should rate the trainer on the skills of a good trainer, outlined earlier. (Refer back to Who Will Do the Training?)

Trainees and trainers should both evaluate the training program on such factors as:

- amount of material covered
- level of terminology used
- the method of training
- the training objectives

Comments for improvements should also be included.

HOW SHOULD TRAINING BE CHANGED DURING THE TRAINING AND IN THE FUTURE?

As you evaluate the trainees, trainers and the training programs, make any appropriate changes to improve the training. Do not feel that you have to wait until the existing training program has ended, and that you can only make changes for the new training program. If you make changes as the present program continues, better training may result.

At the end of each training program, determine how training should be changed in the future. Record these changes as soon as the present training is completed. By doing this you will not forget any details.

6. HOW DO I FOLLOW THROUGH WITH ONGOING COACHING?

The training process never ends. It is necessary for the trainer or supervisor to continue to monitor the employee's performance and compare it to the performance standards. This can be maintained by:

1. Talking regularly with the employee
2. Conducting periodic performance reviews
3. Giving lots of feedback (remember to praise good performance)
4. Helping the employee to develop a plan of action for dealing with any problems

LIST OF TRAINING RESOURCES

There are many sources for training materials, including films, videos and print materials.

These sources include:

- local colleges and universities
- public libraries
- trade associations
- government agencies

Use this page to keep a handy reference of local contacts:

ADDITIONAL NOTES

N.L.C. - B.N.C.
3 3286 07997056 8